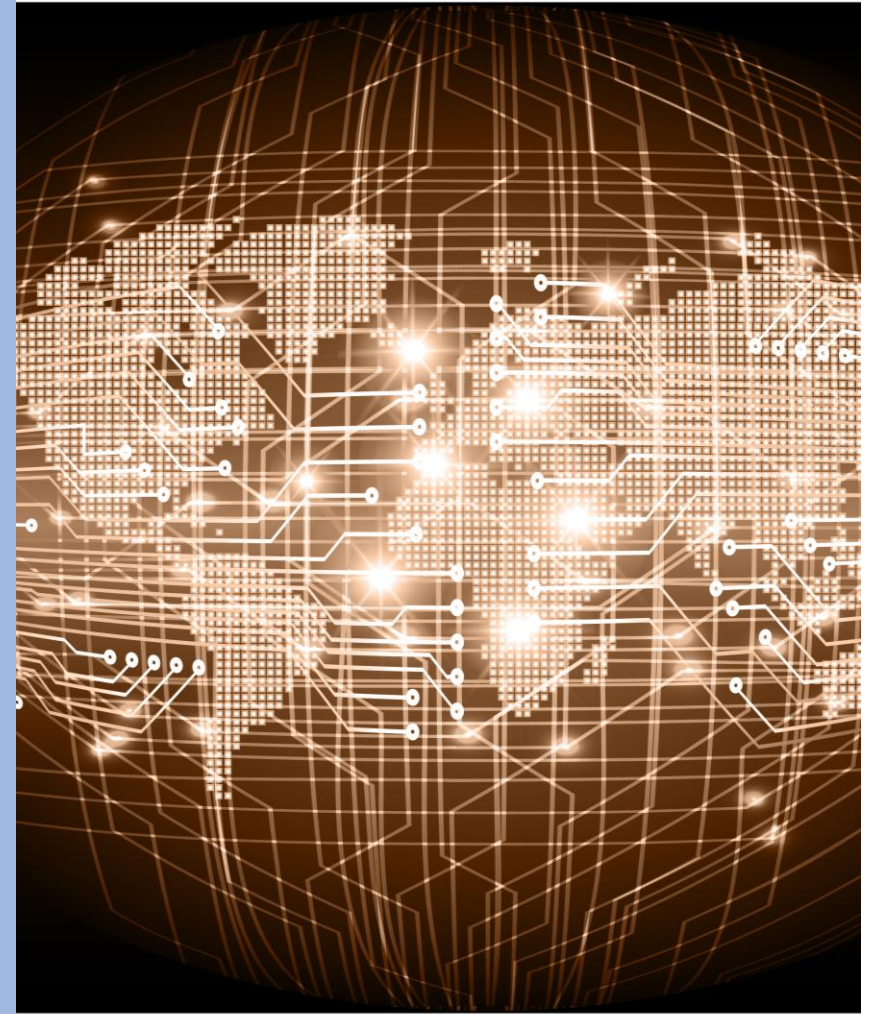


# GROCER-ANCHORED TASKFORCE

Erin Patterson



# Grocer Definitions

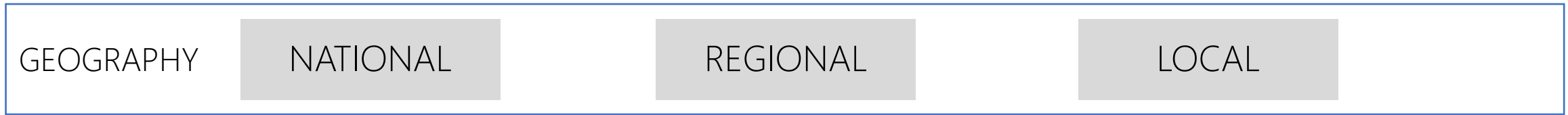
- **Objective:** To provide guidance in classifying and evaluating grocery-anchored centers
- Process
- Grocer Types
- Definitions
- Grocer List
- Appendix



# PROCESS

- Reviewed previous list
- Rounds of review, additions
- Internal Due Diligence: Socialization & review by colleagues/SMEs
- Final Documentation
- Socialization with ODCE PMs + Other Committees

# GROCERY TYPES



## EXPERIENTIAL

Fresh and prepared food offerings (e.g., bakery, smoothies, cafe, lunch bar) and concepts that capture the senses (e.g., bakery aroma, samples); may incorporate technology to create a more personalized & seamless shopping experience.

## GENERAL/ COMMODITY

Offers a wide range of everyday food products and household essential goods; stocks national brands, store brands. Limited selection of specialty, organic, or niche items.

## INTERNATIONAL

Derive the majority of sales from selling culturally diverse foods/ingredients not commonly found in mainstream U.S. grocery stores; may also sell ethnic-specific goods (e.g., Italian).

## SPECIALTY

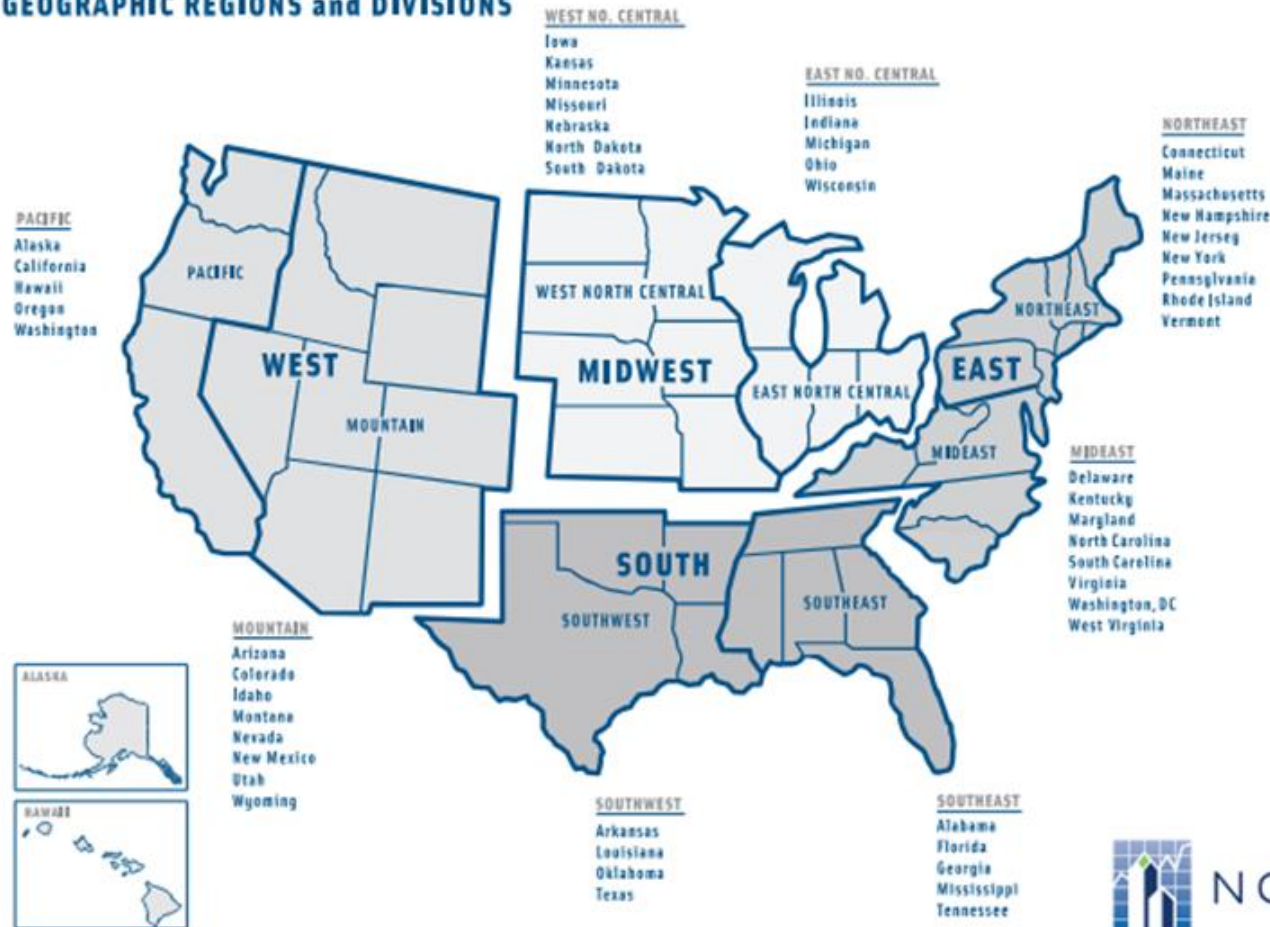
Renowned for private-label and/or exclusive goods, specialize in a particular category of food or unique options, with small brand representation, attracting a loyal customer base; local grocers may fall into this category.

## DISCOUNT

Offer fresh and prepared food at a 15-20% discount, for a narrower range of products, often store-branded, and typically take 10% to 20% of market share around the edges; store concepts are stripped-down, no-frill.

# GEOGRAPHY DEFINITIONS

## GEOGRAPHIC REGIONS and DIVISIONS



## National

- A grocer with multiple locations in each of the 4 geographic regions

## Regional

- Multiple locations within a majority of the geographic divisions within a region

## Local

- All locations contained in only 1 division (or 2 if sharing a border) within 1 geographic region

# CHAIN TYPE

## Grocer

- Comprised of predominantly food items, fresh, packaged and frozen
- Often store-brand loyalty/offering
- Limited availability of household and personal care items
- Smaller prototypes, footprint

## Supermarket

- More household and personal care items
- May include medicine/pharmacy
- Tend to be larger footprints
- Dedicated sections for deli, butcher, seafood counter, bakery, etc.
- More likely to have variation in brand and smaller concept/specialty stores funneling up into "Parent"

Overlap may include food offerings, store features (e.g., bakery), store placement (e.g., stand alone, inline)

# GROCERY TYPES (SEE APPENDIX)

## GENERAL/ COMMODITY

- Stop & Shop
- ShopRite
- Safeway
- Price Chopper
- Publix
- HEB
- Hannaford
- Shaw's
- Giant
- Big Y
- Albertsons
- Piggly Wiggly
- Butera Market
- Ridley's Family Market
- Skogen's Festival Foods
- Sunset Foods
- Tony's Fresh Market
- Amazon Fresh
- Arlans Market
- Associated Supermarkets
- Baker's Plus Supermarkets
- Bashas'
- Berkot's Super Foods
- BI-LO
- Breaux Mart Supermarket
- Brookshire Brothers
- Brookshire's Grocery Company
- C Town Supermarkets
- Carlie C's IGA
- City Market
- Compare Foods Supermarkets
- County Market
- Cub Foods
- Dash's Market
- Dave's Marketplace
- Dick's Fresh Market
- Dierbergs
- Dillons
- Draeger Supermarkets
- Fairplay Foods
- Family Fare
- Fareway Stores
- Food Bazaar Supermarket
- Food City
- Food Giant
- Food King
- Food Lion
- Food Universe Marketplace
- FoodMaxx
- Foods Co
- Foodtown
- Fred Meyer
- Fry's
- Gerbes Super Markets
- Giant Eagle
- Grand Union
- Greer's
- Grocery Advantage
- Haggen
- Harding's Friendly Market
- Harmons Grocery
- Harps Food Store
- Harveys Supermarket
- Hen House
- Hy-Vee
- IGA
- Jay C Food
- Jewel-Osco
- Karns Food
- Kennie's Market
- Key Food
- King Kullen
- King Soopers
- Kings Food Markets
- KJ's Market IGA
- Kroger
- Landis Supermarket
- Lucky Supermarkets
- Lunardi's Markets
- Mariano's
- Martin's Super Markets
- McKay's Market
- McKinnon's Market
- Meijer
- Met Foods
- Needler's Fresh Market
- Pavilions
- Pick 'n Save
- Price Chopper
- QFC (Quality Food Centers)
- Raley's
- Ralphs
- Rancho San Miguel Markets
- Randalls
- Reasor's
- Redner's Markets
- Remke Markets
- Renfroe's Market
- Riesbeck's Food Market
- Rosauers
- Rouses Markets
- Ruler Foods
- Save Mart
- Schnucks
- Sendik's Food Market
- Sentry Foods
- Smart & Final
- Smith's
- Sparkle Market
- Spring Market
- Star Market
- Stater Bros. Markets
- Strack & Van Til
- Super 1 Foods
- Super Foodtown
- Super One Foods
- Supremo Food Markets
- The Fresh Grocer
- Tom Thumb Food & Pharmacy
- Tops Friendly Markets
- United Supermarkets
- VG's Grocery
- Vons
- Winn Dixie
- Woodman's Market
- Yoke's Fresh Market

# GROCERY TYPES (SEE APPENDIX)

## EXPERIENTIAL

- Whole Foods
- Wegmans
- Harris Teeter
- Market Basket
- Fresh Market
- Stew Leonard's
- Gelson's
- Fairway Market
- Bristol Farms
- Central Market
- Heinen's Grocery Store
- Buehler's Fresh Foods
- D&W Fresh Market
- Pete's Market

## INTERNATIONAL

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>• Cardenas Market</li> <li>• Fiesta Supermarkets</li> <li>• Tawa Supermarkets</li> <li>• Vallarta</li> <li>• Supermarkets</li> <li>• H-Mart</li> <li>• Superior Grocers</li> <li>• Angelo Caputo's</li> <li>• Fresh Markets!</li> <li>• Cermak Fresh Market</li> <li>• Lotte Plaza Market</li> <li>• Mitsuya Marketplace</li> <li>• El Super</li> <li>• 99 Ranch Market</li> <li>• Northgate Gonzalez Market</li> </ul> | <ul style="list-style-type: none"> <li>• Sedano's Supermarkets</li> <li>• 168 Market</li> <li>• Big Saver Foods</li> <li>• Chavez Supermarket</li> <li>• Deli 4 You</li> <li>• El Ahorro</li> <li>• Supermarket</li> <li>• El Rancho Supermercado</li> <li>• El Rio Grande</li> <li>• Foodarama</li> <li>• Fresco y Mas</li> <li>• Fresh International Market</li> <li>• Great Wall</li> </ul> | <ul style="list-style-type: none"> <li>• Supermarket</li> <li>• La Bonita Supermarkets</li> <li>• Los Altos Ranch Market</li> <li>• Mariana's Supermarkets</li> <li>• Numero Uno Markets</li> <li>• POCO Loco Super Mercado</li> <li>• Presidente Supermarkets</li> <li>• Valli Produce</li> </ul> |
|--|--|--|

## SPECIALTY

- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Trader Joe's</li> <li>• AJ's Fine Foods</li> <li>• Andronico's Community Markets</li> <li>• Balducci's</li> <li>• Barons Market</li> <li>• DeCiccio's</li> <li>• Earth Fare</li> <li>• Erewhon</li> <li>• Feel Rite Fresh Market</li> <li>• Fresh Thyme</li> <li>• Graul's Market</li> <li>• Ingles Markets</li> <li>• Island Pacific Supermarket</li> <li>• Jensen's Finest Foods</li> <li>• Jimbo's</li> <li>• Kowalski's Market</li> <li>• Lazy Acres</li> <li>• Little Giant Farmers</li> </ul> | <ul style="list-style-type: none"> <li>• Market</li> <li>• Lowe's Foods</li> <li>• Lunds &amp; Byerlys</li> <li>• Market of Choice</li> <li>• McCaffrey's</li> <li>• MOM's Organic Market</li> <li>• Mother's Market</li> <li>• Morton Williams</li> <li>• Natural Grocers</li> <li>• New Seasons Market</li> <li>• North Shore Farms</li> <li>• Nugget Market</li> <li>• Plum Market</li> <li>• Sprouts Farmers Market</li> <li>• Trucchi's Supermarket</li> <li>• Uncle Giuseppe's</li> <li>• Weis Markets</li> <li>• WinCo Foods</li> <li>• Cherry Valley MarketPlace</li> </ul> | <ul style="list-style-type: none"> <li>• Detwiler's Farm Market</li> <li>• Earth Origins Market</li> <li>• Harvest Foods</li> <li>• Mac's Fresh Market</li> <li>• PCC Community Markets</li> <li>• Western Beef</li> </ul> |
|--|---|--|

## DISCOUNT

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• ACME</li> <li>• Aldi</li> <li>• Bi-Mart</li> <li>• Food 4 Less</li> <li>• Grocery Outlet</li> <li>• Lidl</li> <li>• Save-A-Lot</li> <li>• Marc's</li> <li>• Price Rite</li> <li>• Cash Wise Foods</li> <li>• Coborn's</li> <li>• Crest Fresh Market</li> <li>• Food Depot</li> <li>• Fresh N' Low</li> </ul> | <ul style="list-style-type: none"> <li>• King Cash Saver</li> <li>• Metro Market</li> <li>• Pay Less Super Markets</li> <li>• Price Cutter</li> <li>• Price Less Foods</li> <li>• Shop 'n Save</li> <li>• Shoppers Food &amp; Pharmacy</li> <li>• Shursave Markets</li> <li>• Super A Foods</li> <li>• Super Saver</li> <li>• United Grocery Outlet</li> </ul> |
|---|--|



# GROCERY TYPE NOTES & CONSIDERATIONS

## Grocer Qualification

- **With/Without Grocer Guidance**

Any retail center containing a tenant that sells groceries as its primary source of revenue and leases a minimum of 10,000 SF, or currently has a vacant box 10,000 SF or larger that had been occupied by a grocer and has the improvements typical of a grocer. Pharmacies such as Walgreens, CVS and Rite-Aid would not be considered grocers.

- **Wholesalers, Super Chains, Dollar Stores**

May be considered as a “grocer” depending on above and whether (if known) sales at store are dominated by grocery sales, or footprint within store adheres to SF guidance.

- **High-End / Not High-End Guidance**

Specification that grocer is a “specialty” will be revised to: For centers anchored by a grocer, that grocer is an “experiential” grocer.

## General/ Commodity

- **Product Types**

Offers a wide range of everyday food products and household essential goods, and stocks well-known national brands and store brands. Limited selection of specialty, organic, or niche items.

- **Price Point**

Competitive pricing to attract a broad customer base. Focus on affordability rather than premium pricing.

- **Consumer Demographic Target**

Targets a broad and diverse demographic, including families, singles, and seniors. Attracts consumers looking for convenience and value and appeals to budget-conscious shoppers.

- **Trade Area**

Suburban and urban areas with a high population density, typically within a 3-5 mile radius in urban settings and up to 10-15 miles in rural areas.

- **Location type / Example**

Community centers (H-E-B, Kroger, Safeway, Albertsons, Stop & Shop), Neighborhood centers (Publix, Fry's, Giant Food, smaller-format Safeway), Power (Walmart, H-E-B Plus!, Target)